

Retail Clinic Partnerships: The Value Proposition for Hospitals and Health Systems

A Report from the Convenient Care Association

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Introduction

The retail clinic industry was founded upon the principles of providing accessible, affordable high-quality healthcare to Americans. Since its inception, the retail health industry has grown and advanced both in the ever-increasing number of clinic locations throughout the country, and the breadth of services offered in the clinics. During this era of exceptional growth, there has also been a striking increase in involvement of provider groups in the retail health industry. While some traditional healthcare providers initially felt threatened by a disruptive newcomer to the healthcare landscape, the number of hospitals and health systems joining forces with retail clinics has more than doubled in the last year, with over 120 systems actively involved in operating or partnering with retail clinics (see *Appendix A* for complete list of partners).

Core Benefits of Partnerships

The partnerships between retail clinics and hospitals and health systems provide a number of key benefits for both entities, including broader access to care; service expansion opportunities, such as chronic disease management and maintenance; enhanced quality monitoring and improvement programs; ongoing support of continuity of care, and ensured compliance with the Affordable Care Act.

Access Expansion

Access to healthcare is a persistent challenge for millions of Americans. Well before the Affordable Care Act (ACA) was enacted, retail clinic pioneers recognized the need for access to affordable, high-quality basic primary healthcare in convenient settings, and the industry was founded upon those principles. Research has shown that retail clinics are the lowest cost unsubsidized provider of healthcare¹: nearly 40 percent of the urban U.S. population lives within ten minutes of a clinic,^{2,3} and the quality of care provided in the clinics is the same or superior to that of traditional medical settings such as emergency departments and urgent care

Hospital System Considerations for Retail Clinic Affiliations

- Do they want a low cost, walk-in option in their service line for the community?
- Do patients have difficulty in accessing the health system for care, are/or there unnecessary waits?
- Do patients have difficulty accessing primary care physicians? For example, do they experience delays, closed panels, and/or inconvenient office hours?
- Do they want to grow primary care business for their system?
- Do they have an emphasis on affecting population health in a positive way?
- Do they recognize retail health as a tool to manage the population of an ACO?
- Do they want to decant their emergency rooms of patients that don't belong there?
- Do they recognize retail clinics as a service to help them work with businesses in their communities by providing an access point that can help them control their health care costs?
- Will the retail clinic model fully integrate the health system's EMR so that the patient's visit is seamless across the system, in order to create efficiency and cost savings?

centers.⁴ Through partnerships with retail clinics, hospitals and health systems expand their networks, increase access to services for existing patients, and increase their presence in areas where they may not have physical locations.

Collaboration between retail clinics and health systems provides a vehicle for network expansion and increased access to care for existing patients.

For many patients, a retail clinic visit is their first contact with the complex healthcare system, and as many as 60 percent of retail clinic patients do not have an established primary care provider.⁵ Through affiliations with the health systems, retail clinics can offer patients easier access to the affiliated health systems.

Similarly, hospitals and health systems work with retail clinics for after-hours routine care, which may have previously been unnecessarily handled in the emergency department. One study demonstrated that approximately a quarter of emergency department visits could be handled at a retail clinic.⁶ Diverting patients with non-emergent medical needs from the emergency department saves hospitals and health systems millions of dollars each year.

Telehealth is also being utilized by retail clinics, hospitals and health systems to expand access to care, particularly in rural and underserved areas. Telehealth consultations in the retail clinic setting can connect patients with hospitals and health systems who would not otherwise have access to those providers. Working collaboratively, a hospital or health system specialist and retail clinic practitioner can effectively care for a patient with a condition or illness that is not routinely treated in the clinics.

Health System Perspectives

“The Little Clinic care and service model is a patient-centric response to healthcare payment reform. It is one of our most important strategic relationships and allows UC Health to focus time, energy, and resources on specialty services while simultaneously enhancing convenient access to affordable, quality care. Combined, The Little Clinic and UC Health are ideally positioned to improve the health of communities we serve in a noncompetitive, coordinated manner. Ultimately, patients, employers and payers are the beneficiaries of our evolving care relationship and emerging service model.”

Peter J. Iacobelli
Vice President of Strategic Planning & Business Ventures
UC Health

Research has indicated that patients like telehealth visits. CVS Health Research Institute recently released the results of a study regarding patient satisfaction of telehealth visits provided at MinuteClinic® retail clinics, and found that 95% of patients said they were highly satisfied with the quality of the care they received.⁷ Further, over one-third of patients preferred a telehealth visit to a traditional doctor's office visit. With approximately 25 percent of the United States population without an established primary care provider,⁸ the growing primary care provider shortage and overall shortage of healthcare providers in rural areas, telehealth provides one

possible solution, and a definite benefit, by broadening the reach of hospitals and health systems.

Service Expansion

At the outset of the industry, the clinics only treated a limited number of illnesses, such as strep throat, mononucleosis, influenza and sinus, ear and upper respiratory infections. Today, most retail clinics offer basic acute care for minor illness and injuries, wellness and preventive services, and some chronic disease care.

The expansion of services offered in the clinics was undertaken to meet the needs and demand of consumers. Many clinics now offer chronic disease care for conditions like diabetes, hypertension, obesity and hyperlipidemia. There is a strong focus on screening and management of chronic conditions, with management being provided in conjunction with a hospital or health system. As the industry began offering screenings and management of chronic conditions, the Walgreens Healthcare Clinics noted an increase in chronic disease screening and management in 2013,⁹ signifying that patients are in fact seeking care for chronic conditions in the retail clinics.

Clinical collaborations, ongoing monitoring, screenings and assessments are completed using evidence-based guidelines and shared information through electronic health records. Embedded within the electronic health records are clinical protocols followed by both health systems and retail clinic providers, permitting patients to access the same care plan regardless of whether they are seen in traditional hospital/health system or retail clinic settings. Such access should lead to increased treatment adherence and improved patient outcomes. Many clinics support chronic disease care efforts for those patients with well-managed illnesses, freeing up hospitals and health systems to treat patients with more complex conditions.

Improved Quality of Care

The retail clinic industry remains committed to providing high-quality healthcare. Studies continue to demonstrate that the quality of care provided in retail clinics remains high and exceeds national standards.¹⁰ Collaboration between health systems and retail clinics on development of clinical guidelines and protocols for newer services, such as treating and managing chronic conditions, demonstrates the capability of these partnerships to improve the overall quality of care provided.

Additionally, utilizing primary care providers in hospital and health systems as collaborative physicians for retail health providers meets provider chart reviews and consultative needs.

Finally, in partnership with hospitals and health systems, retail clinics have assisted with reducing hospital readmissions by seeing newly discharged patients who could not get an appointment with their primary care provider within a 30-day, post-discharge time frame. Studies have shown that discharged patients seen within a 30-day period of time have lower incidences of readmission.¹¹ As payers move from volume-based to value-based reimbursement, similar programs will prove beneficial for patients as well as the hospitals and health systems. The use of innovative programs in retail clinics, such as predictive analytics, help the clinics to predict declines in patient health and take proactive measures in collaboration with their affiliate hospitals and health systems.

Health System Perspectives

“We’re not in competition with The Little Clinic to grab a small piece of the medical pie. We are entered into a partnership because we believe in access to quality care. Health and wellness is really important to everyone. The more access patients have to coordinate primary care, the better we are all.”

Brian Bacak, M.D., FAAFP
Associate Vice Chair for Clinical Affairs & DFM Associate Professor
Department of Family Medicine, University of Colorado

Increased Continuity of Care & ACA Compliance

The final key benefit of retail clinic-hospital/health systems partnerships is increased continuity and coordination of care for patients and greater population health.

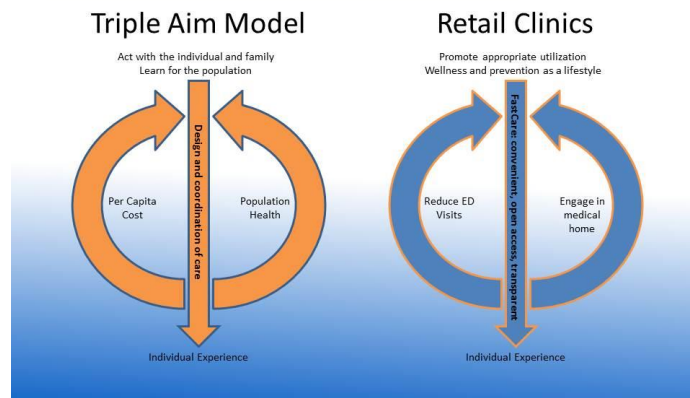
A differentiating characteristic of retail clinics is their continuous and successful efforts to understand the gaps in the healthcare system and the identification of strategies to meet the needs of both consumers and healthcare entities. The clinics were once coined a “disruptive innovation” by Clayton Christensen because of the impact that they have had on thinking about healthcare and healthcare delivery. Retail clinics brought transparency and convenience to an industry that traditionally lacked both. Early opposition to the clinics included the argument that the clinics would disrupt the patient-primary care provider relationship.

With the ACA’s focus on population health and wellness and the expansion of access to high quality, low-cost healthcare – the guiding principles of the retail clinic industry – the clinics help the systems to align with the ACA requirements of accessible, affordable preventive and primary care.

Retail clinics continue to view themselves as a complement to primary care providers. Partnerships with hospitals and health systems allow for data sharing through the integration of electronic health records, enabling providers to have access to a patient’s most current medical records and medical history. The integration of retail clinics within health systems also assists with coordination of care and assists in the establishment of medical homes for patients. Moreover, these collaborations help to improve population health through the joint management of acute and chronic diseases and conditions, and medication management and adherence, which reduces costly emergency department visits.

Through the efforts of the retail clinics to provide access to immunization programs, preventive and wellness programs, and collaborative treatment and management of chronic disease, hospitals and health systems recognize the vital role that the retail clinics play. Connecting with retail clinics enables hospitals and health systems to have a larger primary care footprint and to deliver care more efficiently.

Alignment with Population Health



Conclusion

Innovation, access, technology, wellness and preventive programs and collaboration all contribute to the success of a healthy population. As healthcare reimbursement evolves from a volume-based to a value-based system with a clearer focus on prevention and wellness, retail clinics will continue to be a valuable partner to hospital and health systems. Retail clinics are an integral part of the healthcare ecosystem, not a separate network, and the growing number of partnerships with hospitals and health systems indicates their increasingly important role in the healthcare continuum.

Advantages of Retail Clinic Affiliations

- Expanded access to patients, as well as the ability to provide convenient access to retail healthcare services.
- Opportunities to leverage retail clinic programs and services.
- With retail clinics offering extended evening and weekend hours, patients will benefit from more convenient access to trusted healthcare providers in the community.
- Electronic health records and billing systems will help to deliver a seamless patient experience across their respective touch points, ensuring better continuity of patient care.
- Affiliations can further improve care coordination and continuity of patient care and help facilitate the transition of retail healthcare from urgent episodic conditions to chronic care management, while also strengthening the health system partnerships.
- By working together, gaps are addressed while simultaneously ensuring a more complete continuum of care.

Appendix A

| CCA Clinic Operator | Health System Name | State |
|------------------------------|--|-------|
| CCA Hospital Members | St. Joe's Health and Wellness Corner | CA |
| CCA Hospital Members | Sutter Health | CA |
| CCA Hospital Members | Unity Point Health | IA |
| CCA Hospital Members | Beacon Health System | IN |
| CCA Hospital Members | Baptist Health | KY |
| CCA Hospital Members | Harrison Memorial Hospital | KY |
| CCA Hospital Members | Mississippi Baptist | MS |
| CCA Hospital Members | Geisinger Health System | PA |
| CCA Hospital Members | Memorial Physicians/Yakima Health | WA |
| CCA Hospital Members | Bellin Health | WI |
| FastCare | Johnson Memorial Hospital | CT |
| FastCare | St. Francis Hospital and Medical Center | CT |
| FastCare | Wheaton Franciscan HealthCare-Iowa | IA |
| FastCare | Riverside Medical Center | IL |
| FastCare | Illinois Valley Community Hospital | IL |
| FastCare | FHN Healthcare | IL |
| FastCare | Blessing Health System | IL |
| FastCare | Anne Arundel Medical Center | MD |
| FastCare | Bronson Medical Group | MI |
| FastCare | Sparrow | MI |
| FastCare | Beaumont Health | MI |
| FastCare | Sturgis Hospital | MI |
| FastCare | War Memorial Hospital | MI |
| FastCare | Olmstead Medical Center | MN |
| FastCare | Kennedy Health | NJ |
| FastCare | Pinnacle Health Hospitals | PA |
| FastCare | Aria Health | PA |
| FastCare | Summit Health | PA |
| FastCare | Bon Secours Richmond Health System | VA |
| FastCare | Bon Secours Hampton Roads Health System | VA |
| FastCare | Aspirus Medford | WI |
| FastCare | Bellin Health NorthReach | WI |
| FastCare | ThedaCare | WI |
| FastCare | Monroe Clinic | WI |
| FastCare | Froedtert & The Medical College of Wisconsin | WI |
| Walgreens Healthcare Clinics | Centura Health | CO |

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|------------------------------|---|----|
| Walgreens Healthcare Clinics | Orlando Health | FL |
| Walgreens Healthcare Clinics | Sacred Heart Health System | FL |
| Walgreens Healthcare Clinics | WellStar | GA |
| Walgreens Healthcare Clinics | Eastside Medical Center | GA |
| Walgreens Healthcare Clinics | Advocate Health Care* <i>*Branded as "Advocate Clinic at Walgreens"; clinics managed and operated by Advocate Health Care.</i> | IL |
| Walgreens Healthcare Clinics | Community Health Network | IN |
| Walgreens Healthcare Clinics | KentuckyOne Health | KY |
| Walgreens Healthcare Clinics | Johns Hopkins | MD |
| Walgreens Healthcare Clinics | SSM Health* <i>*Branded as "SSM Health Express Clinic at Walgreens"; managed and operated by SSM Health.</i> | MO |
| Walgreens Healthcare Clinics | HCA MidAmerica | MO |
| Walgreens Healthcare Clinics | Southwest General | OH |
| Walgreens Healthcare Clinics | Mercy Health | OH |
| Walgreens Healthcare Clinics | Summa Health | OH |
| Walgreens Healthcare Clinics | Providence Health & Services* <i>*Branded as "Providence Express Care at Walgreens" and "Swedish Express Care at Walgreens"; managed and operated by Providence Health & Services.</i> | OR |
| Walgreens Healthcare Clinics | Baylor Scott & White | TX |
| Walgreens Healthcare Clinics | Providence Health & Services* <i>*Branded as "Providence Express Care at Walgreens" and "Swedish Express Care at Walgreens"; managed and operated by Providence Health & Services.</i> | WA |
| MinuteClinic | Baptist Health Systems | AL |
| MinuteClinic | University of Alabama at Birmingham Health System | AL |
| MinuteClinic | Dignity Health Arizona | AZ |
| MinuteClinic | Northwest Medical Center | AZ |
| MinuteClinic | Tucson Medical Center and Arizona Connected Care LLC | AZ |
| MinuteClinic | John Muir Health | CA |
| MinuteClinic | Sharp HealthCare | CA |
| MinuteClinic | St. Joseph's Health | CA |
| MinuteClinic | Sutter Health | CA |
| MinuteClinic | UCLA Medical | CA |
| MinuteClinic | Hartford HealthCare Corporation | CT |
| MinuteClinic | ProHealth Physicians LLC | CT |
| MinuteClinic | Baptist Healthcare | FL |
| MinuteClinic | Cleveland Clinic Florida | FL |
| MinuteClinic | Florida Hospital Medical Group | FL |
| MinuteClinic | Millennium Physician Group | FL |
| MinuteClinic | St. Vincent's HealthCare | FL |
| MinuteClinic | Emory Healthcare | GA |
| MinuteClinic | Memorial Health | GA |

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|--------------|---|---------|
| MinuteClinic | Rush University Medical Center | IL |
| MinuteClinic | University of Chicago | IL |
| MinuteClinic | Lawrence Memorial Hospital | KS |
| MinuteClinic | Shawnee Mission Medical Center | KS |
| MinuteClinic | LSU Healthcare Network | LA |
| MinuteClinic | Ochsner Health System | LA |
| MinuteClinic | The Baton Rouge Clinic | LA |
| MinuteClinic | Baystate Health Inc. | MA |
| MinuteClinic | Lahey Health Inc. | MA |
| MinuteClinic | UMass Memorial Health Care | MA |
| MinuteClinic | MedStar Health | MD & DC |
| MinuteClinic | University of Maryland Medical System | MD |
| MinuteClinic | Henry Ford Health System | MI |
| MinuteClinic | University of Michigan Health System | MI |
| MinuteClinic | Allina Health System | MN |
| MinuteClinic | University of Mississippi Medical Center | MS |
| MinuteClinic | Carolinas HealthCare System | NC |
| MinuteClinic | Novant Health | NC |
| MinuteClinic | Bryan Health Connect | NE |
| MinuteClinic | Dartmouth-Hitchcock | NH |
| MinuteClinic | Atlantic Health System | NJ |
| MinuteClinic | Barnabas Health | NJ |
| MinuteClinic | Hackensack University Health Network | NJ |
| MinuteClinic | Robert Wood Johnson | NJ |
| MinuteClinic | Virtua Health | NJ |
| MinuteClinic | Dignity Health - St. Rose Dominican Hospitals | NV |
| MinuteClinic | Mt. Kisco Medical Group | NY |
| MinuteClinic | Northwell Health | NY |
| MinuteClinic | Cleveland Clinic | OH |
| MinuteClinic | OhioHealth | OH |
| MinuteClinic | Premier Health | OH |
| MinuteClinic | TriHealth | OH |
| MinuteClinic | Oklahoma University Physicians | OK |
| MinuteClinic | Commonwealth Health (CHS) | PA |
| MinuteClinic | Lehigh Valley Health Network | PA |
| MinuteClinic | Main Line Health | PA |
| MinuteClinic | St. Luke's University Health Network | PA |
| MinuteClinic | Lifespan | RI |
| MinuteClinic | Greenville Health System | SC |
| MinuteClinic | Palmetto Health Corporation | SC |
| MinuteClinic | Parkridge Health System | TN |
| MinuteClinic | Tennova Healthcare | TN |

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| MinuteClinic | TriStar Health | TN |
| MinuteClinic | Texas Health Resources | TX |
| MinuteClinic | University of Texas Medical Branch at Galveston | TX |
| MinuteClinic | UT Medicine San Antonio | TX |
| MinuteClinic | INOVA | VA |
| RediClinic | Memorial Hermann Health System | TX |
| RediClinic | Seton Healthcare Family | TX |
| RediClinic | Methodist Health Care System | TX |
| The Clinic at Walmart | St. Vincent Health System | AR |
| The Clinic at Walmart | Baxter Regional Medical Center | AR |
| The Clinic at Walmart | SJ Medical/Dr Koka | CA |
| The Clinic at Walmart | Union General Hospital | GA |
| The Clinic at Walmart | InMed Clinical Services | GA |
| The Clinic at Walmart | Central DuPage Hospital | IL |
| The Clinic at Walmart | Riverside Medical Center Fast Care | IL |
| The Clinic at Walmart | Family Medicine Specialists | IL |
| The Clinic at Walmart | Illinois Valley Community Hospital | IL |
| The Clinic at Walmart | St. Bernard Hospital & Health Care Ctr | IL |
| The Clinic at Walmart | Owensboro Medical Health System | IN |
| The Clinic at Walmart | Hardin Memorial Hospital | KY |
| The Clinic at Walmart | Baptist Healthcare System | KY |
| The Clinic at Walmart | Harrison Memorial Hospital | KY |
| The Clinic at Walmart | T.J. Samson Community Hospital | KY |
| The Clinic at Walmart | The Trover Clinic Foundation | KY |
| The Clinic at Walmart | St Mary's Regional Medical Center | ME |
| The Clinic at Walmart | North Mississippi Health System | MI |
| The Clinic at Walmart | Baptist Health Systems | MI |
| The Clinic at Walmart | Memorial Hospital at Gulfport | MI |
| The Clinic at Walmart | North Mississippi Health System Tupelo | MI |
| The Clinic at Walmart | Singing River Health System | MI |
| The Clinic at Walmart | Hennepin County Medical Center | MN |
| The Clinic at Walmart | Fairmont Medical Center | MN |
| The Clinic at Walmart | Stillwater Medical Group | MN |
| The Clinic at Walmart | Missouri Southern Healthcare | MO |
| The Clinic at Walmart | Hannibal Regional Medical Group | MO |
| The Clinic at Walmart | Cox Health | MO |
| The Clinic at Walmart | Heartland Clinic | MO |
| The Clinic at Walmart | Rutherford Regional Medical Center | NC |
| The Clinic at Walmart | Southeastern Regional Medical Center | NC |
| The Clinic at Walmart | Carson-Tahoe Hospital | NV |
| The Clinic at Walmart | Saint Mary's - A Member of CHW | NV |
| The Clinic at Walmart | Adena Health System | OH |

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|-----------------------|---|----|
| The Clinic at Walmart | Heritage Valley Health System | OH |
| The Clinic at Walmart | DuBois Regional Medical Center | PA |
| The Clinic at Walmart | Heritage Valley Health System | PA |
| The Clinic at Walmart | MCH ProCare | TX |
| The Clinic at Walmart | Humana | TX |
| The Clinic at Walmart | Augusta Health | VA |
| The Clinic at Walmart | Aurora Quick Care | WI |
| The Clinic at Walmart | Stillwater Medical Group | WI |
| The Clinic at Walmart | Jackson General Hospital | WV |
| The Clinic at Walmart | Mid-Ohio Valley Medical Group | WV |
| The Little Clinic | University of Colorado Health Partners | CO |
| The Little Clinic | Via Christi Health | KS |
| The Little Clinic | University of Louisville Cardiology Practice | KY |
| The Little Clinic | The Ohio State University Wexner Medical Center | OH |
| The Little Clinic | University of Cincinnati (UC) Health | OH |
| The Little Clinic | Vanderbilt Health Affiliated Network | TN |
| The Little Clinic | Covenant Health | TN |
| The Little Clinic | University of Toledo Physicians | UT |
| The Little Clinic | Virginia Commonwealth University Health System | VA |
| The Little Clinic | St. Vincent Health | IN |

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